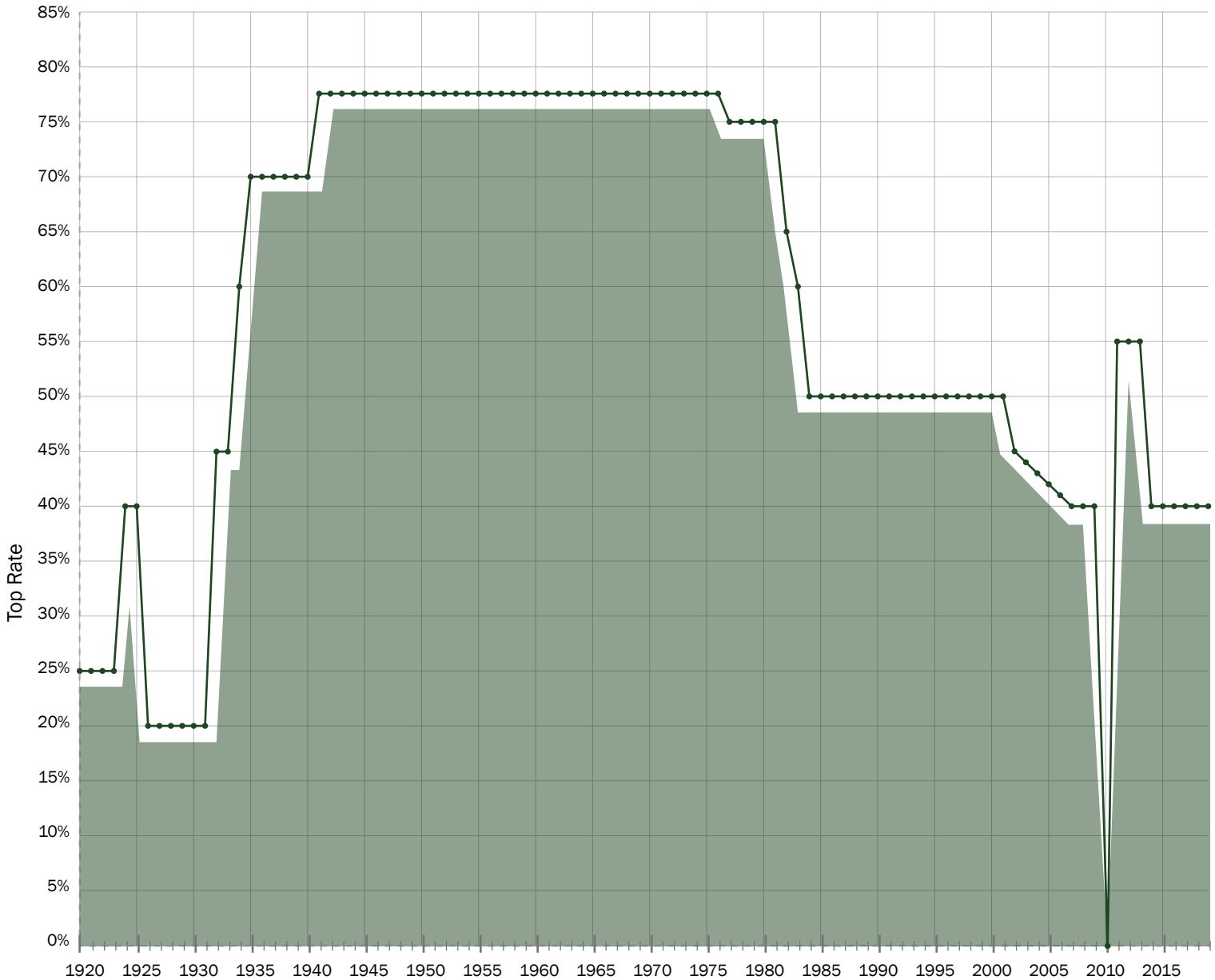




With the election of Donald Trump as the 45th President, there were many questions surrounding his plans on tax reform. Many people predicted he would change, or even repeal, the estate tax; however, three years later the estate tax remains unchanged. Many of those who postponed planning to see what changes would occur may now find themselves behind the “estate-ball” due to inadequate planning. Had proper planning been done they would be in a better position today regardless of any change (or lack of change) to the estate tax.



Source: U.S. Department of the Treasury. Internal Revenue Service: U.S. Department of Commerce. Bureau of Economic Analysis.

WHAT CAN WE LEARN FROM THIS HISTORICAL DATA?

Regardless of what reforms may be around the corner, the prudent strategy remains to plan today with various exit options and the ability to modify that planning as needed.

Tyler Horning

P: 419.794.1082 | E: thorning@tdclife.com